



ATTENTION

Probate cases on this calendar are currently under review by the probate examiners. Review of some probate cases may not be completed and therefore have not been posted.

If your probate case has not been posted please check back again later.

Thank you for your patience.

(1) Second and Final Account and Report of Conservator and (2) Petition for Allowance of Compensation to Conservator and Attorney

DOD: 01/20/12		PUBLIC GUARDIAN , Conservator, is Petitioner.	NEEDS/PROBLEMS/COMMENTS:
		Final Account period: 02/10/09 – 01/20/12	
Cont. from		Accounting - \$43,629.12	
<input type="checkbox"/>	Aff.Sub.Wit.	Beginning POH - \$3,033.50	
<input checked="" type="checkbox"/>	Verified	Ending POH - \$2,195.74	
<input type="checkbox"/>	Inventory		
<input type="checkbox"/>	PTC	Subsequent Account period: 01/21/12 – 04/18/12	
<input type="checkbox"/>	Not.Cred.		
<input checked="" type="checkbox"/>	Notice of Hrg	Accounting - \$2,554.95	
<input checked="" type="checkbox"/>	Aff.Mail	Beginning POH - \$2,195.74	
	Aff.Pub.	Ending POH - \$2,554.95	
	Sp.Ntc.	Conservator - \$1,738.80 (9.8	
	Pers.Serv.	Deputy hours @ \$96/hr. and 10.5 staff hours @ \$76/hr.)	
	Conf. Screen	Attorney - \$2,000.00 (Less than allowed per Local Rule)	
	Letters		
	Duties/Supp	Bond fee - \$75.00 (ok)	
	Objections		
	Video Receipt	Petitioner requests that due to the insufficiency of the estate to pay the fees and commissions that a lien be imposed upon the estate for any unpaid balances of the authorized fees and commissions.	
	CI Report		
	2620(c)	n/a	
<input checked="" type="checkbox"/>	Order		
	Aff. Posting		
	Status Rpt		
	UCCJEA		
	Citation	Petitioner prays for an Order:	
	FTB Notice	<ol style="list-style-type: none"> 1. Finding that the conservatorship of the person and estate terminated on 01/20/12, the conservatee's date of death; 2. Approving, allowing and settling the Second and Final account; 3. Authorizing the conservator and attorney's fees and commissions; 4. Authorizing payment of the bond fee; and 5. Authorizing Petitioner to impose a lien on the estate for any unpaid balances of authorized fees and commissions. 	

Reviewed by: JF

Reviewed on: 06/21/12

Updates:

Recommendation:

File 1 - Santiago

(1) Second and Final Account and Report of Conservator and (2) Petition for Allowance of Compensation to Conservator and Attorney

DOD: 01/26/12	PUBLIC GUARDIAN , Conservator, is Petitioner.	NEEDS/PROBLEMS/COMMENTS:
	Final Account period: 03/01/10 – 01/26/12	
	Accounting - \$26,327.12	
Cont. from	Beginning POH - \$349.14	
Aff.Sub.Wit.	Ending POH - \$1,760.12	
<input checked="" type="checkbox"/> Verified	Subsequent Account period: 01/27/12 – 04/17/12	
Inventory	Accounting - \$1,811.12	
PTC	Beginning POH - \$1,760.12	
Not.Cred.	Ending POH - \$1,811.12	
<input checked="" type="checkbox"/> Notice of Hrg	Conservator - \$1,428.80 (8.55	
<input checked="" type="checkbox"/> Aff.Mail w/	Deputy hours @ \$96/hr. and 8 Staff hours @ \$76/hr.)	
Aff.Pub.	Attorney - \$2,000.00 (Per Local Rule)	
Sp.Ntc.	Bond Fee - \$50.00 (ok)	
Pers.Serv.	Petitioner requests that due to the insufficiency of the estate to pay the fees and commissions that a lien be imposed upon the estate for any unpaid balances of the authorized fees and commissions.	
Conf. Screen		
Letters		
Duties/Supp		
Objections		
Video Receipt		
CI Report		
9202		
<input checked="" type="checkbox"/> Order	Petitioner prays for an Order:	
Aff. Posting	6. Finding that the conservatorship of the person and estate terminated on 01/26/12, the conservatee's date of death;	
Status Rpt	7. Approving, allowing and settling the Second and Final account;	
UCCJEA	8. Authorizing the conservator and attorney's fees and commissions;	
Citation	9. Authorizing payment of the bond fee; and	
FTB Notice	10. Authorizing Petitioner to impose a lien on the estate for any unpaid balances of authorized fees and commissions.	
		Reviewed by: JF
		Reviewed on: 06/21/12
		Updates:
		Recommendation:
		File 2 - Wruk

**Petition for Instructions Ordering JPMorgan Chase Bank, N.A. to Release
 Conservatee's IRA Account Funds to the Public Guardian Pursuant to Probate
 Code 850 (a)(1)(D)**

DOB: 6-28-27		PUBLIC GUARDIAN , Conservator, is Petitioner.	NEEDS/PROBLEMS/COMMENTS: <u>Continued from 6-13-12</u> <u>Minute Order 6-13-12 states Counsel informs the Court that Mr. Ivy is requesting a continuance.</u> <u>As of 6-20-12, nothing further has been filed.</u> Note: According to the previously settled Final Account, the balance of the Chase IRA was \$26,097.76 as of 3-6-10. Note: Chase Bank was personally served with Summons, Notice of Hearing, and a copy of the petition via CT Corporation as agent for service of process. Note: Examiner notes that the Public Guardian's time itemization associated with the first account indicates that Deputy Mauro traveled to Chase on at least two occasions during the conservatorship, beginning at appointment (all prior to the Conservatee's death) to close accounts. See entries on 4-27-09 and 11-13-09.
DOD: 11-26-09			
		Petitioner states that prior to the Conservatee's death on 11-26-09, Deputy Public Guardian Stacy Mauro traveled to Chase Bank and close out the Conservatee's checking and CD accounts. She also closed the Chase IRA; however, was told that the check would be mailed to her office, rather than receiving it at the bank.	
Cont. from 061312		Deputy Mauro was asked more than once to provide documentation, including certified and notarized documents. She provided everything Chase requested, but they still refused to turn over the funds with no explanation, despite the fact that the branch employee acknowledged the documentation.	
<input type="checkbox"/>	Aff.Sub.Wit.		
<input checked="" type="checkbox"/>	Verified	The Conservatee died on 11-29-09, <u>after the account was closed.</u>	
<input type="checkbox"/>	Inventory		
<input type="checkbox"/>	PTC	SUSAN TROTTER was appointed as executor of the Conservatee's will on 2-4-10, and Letters issued on that day. Since Chase had not sent the IRA funds as of that date, Ms. Trotter sought to have them released to her.	
<input type="checkbox"/>	Not.Cred.		
<input checked="" type="checkbox"/>	Notice of Hrg	Like Deputy Mauro, Ms. Trotter provided all documentation requested by Chase Bank, yet they still refused to turn the funds over to her with no explanation.	
<input checked="" type="checkbox"/>	Aff.Mail		
<input type="checkbox"/>	Aff.Pub.	Petitioner therefore requests an order under Probate Code §850 to order Chase Bank to release the deceased Conservatee's IRA account funds to the Public Guardian.	
<input type="checkbox"/>	Sp.Ntc.		
<input type="checkbox"/>	Pers.Serv.		
<input type="checkbox"/>	Conf. Screen		
<input type="checkbox"/>	Letters		
<input type="checkbox"/>	Duties/Supp		
<input type="checkbox"/>	Objections		
<input type="checkbox"/>	Video Receipt		
<input type="checkbox"/>	CI Report		
<input type="checkbox"/>	9202		
<input checked="" type="checkbox"/>	Order		
<input type="checkbox"/>	Aff. Posting		
<input type="checkbox"/>	Status Rpt		
<input type="checkbox"/>	UCCJEA		
<input type="checkbox"/>	Citation		
<input type="checkbox"/>	FTB Notice		
		Reviewed by: skc	
		Reviewed on: 6-20-12	
		Updates:	
		Recommendation:	
		File 3 - Phelps	

Allowance of Commissions and Fees, for Extraordinary Fees, Costs Advanced and (3) Final Distribution (Prob. C. 10800, 10810, 10811, 12201)

DOD: 10-20-09			<p>MONICA ABASOLO, Sister and Executor with Full IAEA without bond, is Petitioner.</p> <p>Accounting: \$160,000.00 Beginning POH: \$160,000.00 Ending POH: \$106,559.36 (cash)</p> <p>Executor: Waived</p> <p>Attorney (Statutory): \$4,765.00</p> <p>Attorney (Extraordinary): \$11,790.00 (for legal services in connection with will contest litigation, unlawful detainer action, 850 petition itemized at Exhibit K)</p> <p>Costs: \$1,938.60 (filing, certified copies, etc.)</p> <p>Distribution pursuant to Decedent's will dated 10-11-09:</p> <p>Monica Abasolo: \$88,065.76</p>	<p>NEEDS/PROBLEMS/COMMENTS:</p>
	Aff.Sub.Wit.			
✓	Verified			
✓	Inventory			
✓	PTC			
✓	Not.Cred.			
✓	Notice of Hrg			
✓	Aff.Mail	w		
	Aff.Pub.			
	Sp.Ntc.			
	Pers.Serv.			
	Conf. Screen			
✓	Letters	2-18-11		
	Duties/Supp			
	Objections			
	Video Receipt			
	CI Report			
✓	9202			
✓	Order			
	Aff. Posting			
	Status Rpt			
	UCCJEA			
	Citation			
✓	FTB Notice			
			<p>Reviewed by: skc</p> <p>Reviewed on: 6-22-12</p> <p>Updates:</p> <p>Recommendation:</p> <p>File 4 - Vasquez</p>	

(1) First and Final Account and Report of Personal Representative and Petition for Its Settlement (2) for Allowance of Attorneys' Fees for Ordinary and Extraordinary Services and (3) for Final Distribution (Probate Code 11640)

DOD: 02/05/10		MARGARET YOUNG , Executor, is Petitioner.	NEEDS/PROBLEMS/COMMENTS: 1. Need Order.
		Account period: 02/05/10 – 02/29/12	
Cont. from		Accounting - \$666,070.52	
<input type="checkbox"/>	Aff.Sub.Wit.	Beginning POH - \$645,145.92	
<input checked="" type="checkbox"/>	Verified	Ending POH - \$597,935.49	
<input checked="" type="checkbox"/>	Inventory	Executor - waived	
<input checked="" type="checkbox"/>	PTC	Attorney - \$16,125.12	
<input checked="" type="checkbox"/>	Not.Cred.	(\$15,850.48 to Baker, Manock & Jensen and \$274.64 to Quinlan, Kershaw & Fanucchi)	
<input checked="" type="checkbox"/>	Notice of Hrg	Attorney x/o fees - \$5,156.00 (per itemization for 27.2 hours of time spent regarding issues involving beneficiary Charles E. Young (a disabled adult) and Petition for Order Confirming that Property should be Paid to the Estate)	
<input type="checkbox"/>	Aff.Mail	Costs - \$902.46	
<input type="checkbox"/>	Aff.Pub.	Closing - \$5,000.00	
<input type="checkbox"/>	Sp.Ntc.		
<input type="checkbox"/>	Pers.Serv.		
<input type="checkbox"/>	Conf. Screen		
<input type="checkbox"/>	Letters 05/20/10		
<input type="checkbox"/>	Duties/Supp		
<input type="checkbox"/>	Objections		
<input type="checkbox"/>	Video Receipt		
<input type="checkbox"/>	CI Report		
<input checked="" type="checkbox"/>	9202		
<input type="checkbox"/>	Order x		
<input type="checkbox"/>	Aff. Posting		
<input type="checkbox"/>	Status Rpt		
<input type="checkbox"/>	UCCJEA		
<input type="checkbox"/>	Citation		
<input checked="" type="checkbox"/>	FTB Notice	Margaret A. Young - \$147,073.96 cash, plus a 1949 Chevrolet pickup, miscellaneous household furniture and furnishings, and an undivided ½ interest in real property Margaret A. Young as Trustee of the Charles E. Young Special Needs Trust - \$164,677.95 cash, plus an undivided ½ interest in real property	Reviewed by: JF Reviewed on: 06/22/12 Updates: Recommendation: File 5 - Young

(1) First Account Current and Report of Conservator and (2) Petition for Allowance of Compensation to Conservator and Attorney and for (3) Dispensation of Further Accounts (Prob. Code 2620; 2623; 2628; 2630; 2942)

Age: 52		PUBLIC GUARDIAN , Conservator, is Petitioner.	NEEDS/PROBLEMS/COMMENTS:
DOB: 12-4-59			
		Account period: 3-4-11 through 4-4-12	
		Accounting: \$17,590.51	
		Beginning POH: \$208.58	
		Ending POH: \$3,624.02 (cash)	
<input type="checkbox"/>	Aff.Sub.Wit.	Conservator: \$5,809.36	
<input checked="" type="checkbox"/>	Verified	(45.71 Deputy hours @\$96/hr and 18.70 Staff hours @ \$76/hr itemized at Exhibit B)	
<input checked="" type="checkbox"/>	Inventory	Attorney: \$2,000.00 (per local rule)	
<input type="checkbox"/>	PTC	Bond fee: \$25.00 (ok)	
<input type="checkbox"/>	Not.Cred.	Petitioner requests that due to the insufficiency of the estate to pay the fees and commissions that a lien be imposed upon the estate for any unpaid balances of the unauthorized fees and commissions.	
<input checked="" type="checkbox"/>	Notice of Hrg	Petitioner states that the conservatorship estate meets the requirements of Probate Code §2628 to dispense with further accountings as long as the conservatorship estate meets the requirements of Probate Code §2628.	
<input checked="" type="checkbox"/>	Aff.Mail	Petitioner prays for an Order:	
<input type="checkbox"/>	Aff.Pub.	1. Approving, allowing and settling the account;	
<input type="checkbox"/>	Sp.Ntc.	2. Authorizing the conservator and attorney fees and commissions;	
<input type="checkbox"/>	Pers.Serv.	3. Payment of the bond fee;	
<input type="checkbox"/>	Conf. Screen	4. Authorizing petitioner to impose a lien on the estate for any unpaid balances of authorized fees and commissions;	
<input type="checkbox"/>	Letters	5. Dispensation of further accounts; and	
<input type="checkbox"/>	Duties/Supp	6. Other relief that the Court considers proper.	
<input type="checkbox"/>	Objections		
<input type="checkbox"/>	Video Receipt		
<input checked="" type="checkbox"/>	CI Report		
<input type="checkbox"/>	2620(c)		
<input checked="" type="checkbox"/>	Order		
<input type="checkbox"/>	Aff. Posting		
<input type="checkbox"/>	Status Rpt		
<input type="checkbox"/>	UCCJEA		
<input type="checkbox"/>	Citation		
<input type="checkbox"/>	FTB Notice		
			Reviewed by: skc
			Reviewed on: 6-22-12
			Updates:
			Recommendation:
			File 6 - Lopez

Petition to Determine Succession to Real Property (Prob. C. 13151)

DOD: 2-1-10		FELICIA GARCIA , Spouse, is Petitioner.	NEEDS/PROBLEMS/COMMENTS:
		Declaration filed 4-18-12 includes the Decedent's four children MONICA RODRIGUEZ, STEPHANIE GARCIA, ELIZABETH R. GARCIA, and EZEKIAL GARCIA, JR. , as additional petitioners.	<u>Minute Order 3-29-12:</u> The Court would accept declarations by the other Garcia children stating the petitioner is acting on his/her behalf and that each could benefit. Those not wanting to partake could file a quitclaim.
Cont. from 030812, 032212, 032912			
	Aff.Sub.Wit.		Examiner notes that the Declaration filed 4-18-12 is signed by all heirs and requests distribution pursuant to Probate Code §6401.
✓	Verified		
✓	Inventory		Examiner has interlineated the Order to reflect distribution pursuant to the Declaration.
✓	PTC		
	Not.Cred.		
✓	Notice of Hrg		
✓	Aff.Mail	W	
	Aff.Pub.		
	Sp.Ntc.		
	Pers.Serv.		
	Conf. Screen		
	Letters		
	Duties/Supp		
	Objections		
	Video Receipt		
	CI Report		
	9202		
✓	Order		
	Aff. Posting		Reviewed by: skc
	Status Rpt		Reviewed on: 6-21-12
	UCCJEA		Updates:
	Citation		Recommendation: SUBMITTED
	FTB Notice		File 8 - Garcia